## Accessing RetaEnroll from Retatrust.org

## Real People. Real Reta.

There are good reasons why Reta continues to add new members as they bring increasing value to those they serve. But this story is best told by the *Real People of Reta.* 



Play Video

CHARLES LAWRENCE CHIEF FINANCIAL OFFICER ROMAN CATHOLIC DIOCESE OF BOISE, ID Reta A Catholic Healthcare Trust Over 40 years of dedicated service

# Quality Healthcare. Catholic Values.

Welcome to Reta. We are a non-profit employer trust that has provided affordable, quality healthcare for employees and members of Catholic organizations nationwide for over 40 years.

Importantly, all Reta healthcare plans are designed to comply with the Ethical and Religious Directives of the Catholic Church.



About Reta
The Reta Advantage
Member Organizations
Reta Leadership
Contact Us
Home

### Select RetaEnroll to access the MyEnroll system

# Choose your destination

RetaAccess gives you access to all of Reta's benefits partners with just a single user name and password. Please choose your destination from the options below.



WebMD

*The Benefits Center* provides a wealth of information about the benefits plans and options available to you.

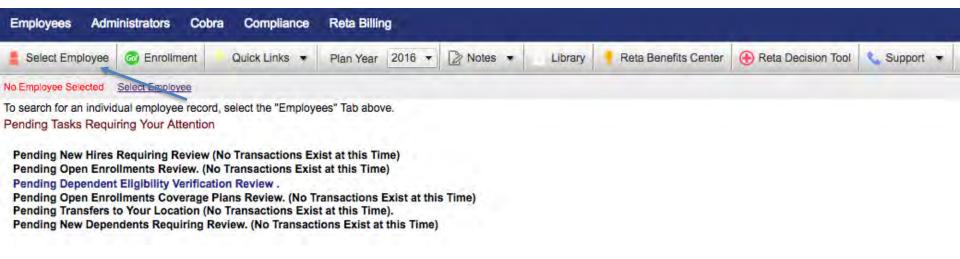


*RetaEnroll* lets you review and manage your benefits enrollment choices.

WebMD provides a comprehensive, personalized wellness program for Reta members.



## Step 1 – Select the Employee



### Step 2- Access Enrollment wizard

Employees Administrators Cobra	Compliance Re	eta Billing				
Select Employee 🕝 Enrollment	Quick Links 💌 Pla	an Year 2017 🔻 🗋 Notes	Library	Reta Benefits Center	Reta Decision Tool	📞 Support 👻
Selected CHRISTINE Rdrind ID# 326433 Empl	loyer Church location 1 A/I	0007212-0001-000				
Employee Home Page	Active (07/01/200	9)*****				
Home Coverage Coverage F	History Dependen	ts Dependent Coverage	ACA & Tax Form	ns Transfers		
Annual Open Enrollment	Go					
Name & Home Address	Edit A	ccounts				
CHRISTINE Rdrlrhd		Church location 1-(Active (07/01/2	009))-326433			
326433 Main Str Anywhere, PA 62223	0	lassifications				

CHRISTINE Rdrinhd	Enrollment Type:	Annual Open Enrollment for 2017	
Church location 1	Enrollment Period: Days Remaining to Enroll:	04/27/2017 - 05/17/2017 1 Days	
Open Enrollment Timeframe You do not need to complete the enrollment pr displayed on the status bar at the top of this pa Click on the BEGIN YOUR ENROLLMENT bu Open Enrollment Resources If you need more information or have question Benefit Plan Information: To access i	age, along with the number of days remaining in the Open Enroll utton to move automatically through each of the enrollment steps ns about your benefits or the Open Enrollment process, the follow information about your employee benefit plan options, select "To	listed to the right.	CUSTOMER SERVICE 1,877.301-7382 Service@RetaEnroll.org Cluick Links) Welcome Instructions Personal Information Personal Information Per
BEGIN YOUR ENROLLMENT			Selected Enrollment       1113 AN PPO 500-1     \$158.50       Delta Dental Illi     \$36.20       Total Cost*     \$194.70
			*Employee Per Pay Cost



1.877.301-7382

## Current Enrollment: 1113 AN PPO 500-1 (GOLD PLAN) - Employee Only

Status	Monthly Cost				
Waive Medical Insurance	B				
OEmployee Only	\$0.00				
1113 AN PPO 500-1 (GOI	LD PLAN)	Covered	d Dependents	Edit	
Employee Only	\$158.50	Sample	DOB: 02/02	2/2017 No	t Assign
OEmployee + One	\$669.20				1
Employee + Two or 1	More\$982.40 Note (1)				
1124 AN PPO 1000-2 (SIL	LVER PLAN)				
OEmployee Only	\$95.10				
Employee + One	\$509.80				
Employee + Two or 1	More\$841.50 Note (1)				
1157 AN PPO 1500-2 (BR	RONZE PLAN)				
OEmployee Only	\$36.80				
CEmployee + One	\$436.40				
Employee + Two or )	More\$756.10 Note (1)		/		
Note 1: Cannot elect cove	erage because you do no	ot have an e	ligible depen	dent.	
our selected benefit plan	is pended (i.e., not enrol	lled with the	insurer carri	er) until yo	ou fulfill the
Name	Plan Name		mily Status		Status
Dependent Sample 1113	AN PPO 500-1 (GOLD P	LAN) Em	ployee + One	\$0.00	Pending

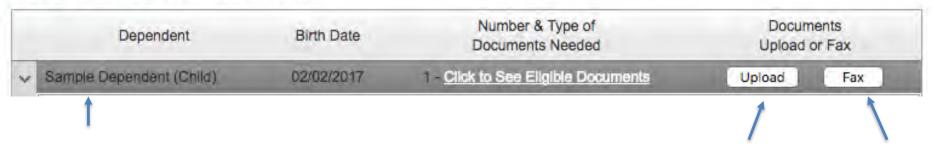
## Employee needs to submit verification documents for the below dependents.

#### Dependents Requiring Verification Documentation

Instructions for Validating Your Dependents

If you are not ready to upload your documents or to print the fax cover page now, you can return to this page by selecting 'Manage Dependents Verifications' from the left-side menu. You have until <u>08/30/2017</u> to finish this process. Failure to submit correct documentation by this date may result in your dependent(s) not receiving coverage.

Employee Rdrind, CHRISTINE (ID#326433)



## No employee action needed- Dependents have been verified

#### **Dependents Requiring Verification Documentation**

Instructions for Validating Your Dependents

If you are not ready to upload your documents or to print the fax cover page now, you can return to this page by selecting 'Manage Dependents Verifications' from the left-side menu.

You have until to finish this process. Failure to submit correct documentation by this date may result in your dependent(s) not receiving coverage.

Employee Kpjdjhh, Beth (ID#826607)

Dependent	Birth Date	Number & Type of Documents Needed	Documents Upload or Fax
No records to display.	+		

ou have chosen to upload do	ocuments from your computer that will verify your dependent's
ligibility	
mployee	CHRISTINE Rdrlrhd (#326433)
elected Dependent	Sample Dependentd, Child
lequired Documents	View
	porting documents in the PDF format only. documents you upload at one time must not exceed 2 Gigabytes.
Select File(s) to Upload from	n your computer
	Select
cancel	
cancel	
cancel	

Dependent		Birth Date	Number & Type of Documents Needed	Documents Upload or Fax		
¥	Sample Dependentd (Child)	02/02/2017	- Click to See Eligible Documents	Upload	Fax	
	RECORD_ID	FILE_NAME	STATUS	ACTION		
	No records to display.					

#### Fax or Mail Option

Use this Option to print and mail/fax your supporting documents

- 1. Generate a personalized, bar-coded Fax/Mailing Coversheet
- 2. Print the personalized, bar-coded Fax/Mailing Coversheet
- 3. Mail or fax the supporting documents, along with the Coversheet. Faxing and mailing instructions are located on the Coversheet you print.

## If you are submitting documentation for more than one dependent, you MUST use a separate fax cover sheet for each dependent and fax them separately. Make sure to use the correct personalized cover sheet for each fax transmission.

Print Coversheet

Back Next

### Your Pending Elections

Pending elections indicate a request for coverage and will not be effective without administrative and/or insurance ca

Name	Benefit Plan	Benefit Leve	Pending	Your Cost	Effective Date	
Dependentd, Sample	1113 AN PPO 500-1 (GOL PLAN)	D Employee + One	Add	N/A	07/01/2017	
Your Depende	ents				_	
Full Name	Rela	ation DOI	3		Gender	
Dependentd Sample		Child 02/02		Ma	ale	

#### Please read this entire page and choose the appropriate button located below.

I hereby acknowledge that I have read and understand the informational materials provided by my employe

I acknowledge that the benefit elections confirmed by me, are irrevocable and may not be changed until the procedures as described in the informational materials for making such a change. By choosing the "Finalize deduction, for the benefits that I elected and confirmed by me, and such authorization is voluntary.

#### Your Electronic Signature

I Accept I do not Accept

Finalize

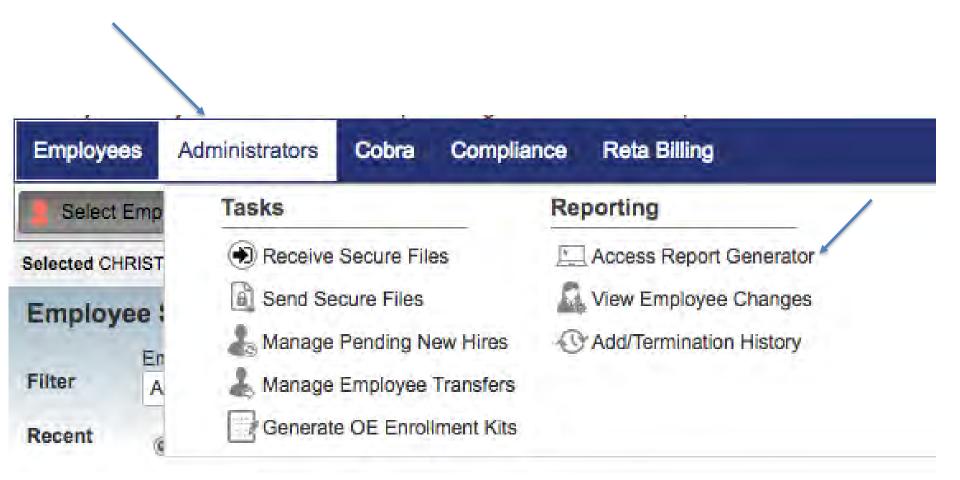
(If you "Finalize" you still will be able to return to this enrollment wizard later to make changes until the end of the Enrollment Period).



# - Enrollment Status Report

- *Take Away*- How far did your employee get in the enrollment process.

## **Accessing Reports**



# **Open Enrollment Reports**

## **Report Generator**

Reports By Group	Favorites
Census Reports	
Active Employees with Active Dependents	Add To Favorites
Active Employees with Inactive Dependents	Add To Favorites
Basic Active Employees Personal & Address Data Census(Excludes Active COBRA)	Add To Favorites
Beneficiaries List	Remove From Favorites
Census Report Enrollment Status Report	Remove From Favorites
Census Salary Report	Add To Favorites
Enrollment Status Report	Remove From Favorites
HRB Location Map	Add To Favorites
Favorites	
Coverage Reports	
FSA - List of All Participants	Add To Favorites
Pending Election Report	Remove From Favorites

## Enrollment Status Report example

BAS	- · · · ·			Enrollment Status I	Report								
Trustor	- Location	-	HRB #	Class Code - Description		7	Last Name	7	First Name	v	Last Page Accessed	Enrollment Wizard Access Date	Last Login Date / Time
Master acc 0007212	Church location	t I	540	IX - Benefits Ineligible	858660		Akeckia	-	Mary Ellen		Did not access OE Wizard		
Master acc 0007212	Church location	1	040	V - Retired Priests	326539		Bîtninj		DONALD		Did not access OE Wizard		5/4/2011 9:36:11 AM
Master acc 0007212	Church location	1	40	V - Retired Priests	326695		Bitntrf		THEODORE		Did not access OE Wizard		
Master acc 0007212	Church location	1	540	I - Lay Employees	621025		Bprizzf		Lucia		Completed	5/3/2017 4:54:41 PM	5/3/2017 4:53:35 PM
Master acc 0007212	Church location	t i	40	I - Lay Employees	327018		Bgeyssi		DAVID		Completed	5/7/2017 8:32:30 PM	5/7/2017 8:28:49 PM
Master acc 0007212	Church location	1	040	V - Retired Priests	326941		Brizipb		JAMES		Did not access OE Wizard		
Master acc 0007212	Church location	1 1	340	II - Priests	326242		Buicigo		EDWARD		Completed	4/30/2017 10:18:28 PM	
Master acc 0007212	Church location	1	40	V - Retired Priests	326669		Cfintrj		DAVID		Did not access OE Wizard		
Master acc 0007212	Church location	t i	540	V - Retired Priests	326923		Cznihoxd		ROBERT		Did not access OE Wizard		
Master acc 0007212	Church location	1	40	V - Retired Priests	326575		Dpdxdxf		JAMES		Did not access OE Wizard		
Master acc 0007212	Church location	1	540	V - Retired Priests	326730		Eccwcea		HENRY		Did not access OE Wizard		
Master acc 0007212	Church location	1	40	VI - Retired Lay Employees	325991		Fdridnb		DOROTHEA		Did not access OE Wizard		
Master acc 0007212	Church location	1	40	IX - Benefits Ineligible	659808		Fgigcii		Sr. Mary Fran		Did not access OE Wizard		
Master acc 0007212	Church location	1 1	40	IX - Benefits Ineligible	811002		Fkeoccc		Marlene		Did not access OE Wizard		
Master acc 0007212	Church location	1	40	IV - Seminarians	864598		Fuowaui		Nicholas		Completed	4/30/2017 10:49:09 PM	
Master acc 0007212	Church location	1 1	40	V - Retired Priests	326922		Fyrngmwc		JOHN		Did not access OE Wizard		
Master acc 0007212	Church location	1 1	340	V - Retired Priests	579759		Girjfhj		JAMES		Did not access OE Wizard		4/22/2013 3:36:54 PM
Master acc 0007212	Church location	1	040	I - Lay Employees	677604		Gsumgee		Michael		Completed	5/2/2017 2:51:05 PM	5/2/2017 2:40:51 PM
Master acc 0007212	Church location	1 1	540	I - Lay Employees	511272		Hioymuc		Judy		Completed	5/4/2017 10:45:03 AM	4/29/2016 9:29:05 AM
Master acc 0007212	Church location	1 1	540	V - Retired Priests	697330		Hkmysea		LEO		Did not access OE Wizard		
Master acc 0007212	Church location	1 (	40	IV - Seminarians	808147		Hpjjrvh		Anthony		Completed	4/30/2017 10:50:56 PM	
Master acc 0007212	Church location	1 1	040	I - Lay Employees	754821		Hpnipvb		Kathleen		Completed	5/1/2017 9:45:38 AM	5/1/2017 9:38:28 AM
Master acc 0007212	Church location	1 1	040	I - Lay Employees	415756		Higakceg		MARY		Completed	5/5/2017 10:29:02 AM	5/5/2017 9:55:26 AM
Master acc 0007212	Church location	1	40	V - Retired Priests	326239		Hrfzfnj		VINCENT		Did not access OE Wizard		
Master acc 0007212	Church location	1	540	V - Retired Priests	326632		Huicigo		STEPHEN		Did not access OE Wizard		
Master acc 0007212	Church location	1	040	IX - Benefits Ineligible	770925		Hzxppzf		Joan		Did not access OE Wizard		
Master acc 0007212	Church location	1	640	II - Priests	697221		Jihtnyb		NICHOLAS		Completed	5/3/2017 11:48:48 AM	4/22/2016 12:47:10 PM
Master acc 0007212	Church location	1	40	I - Lay Employees	588759		Jpvxfhj		William		Completed	5/3/2017 4:32:35 PM	5/3/2017 4:08:01 PM
Master acc 0007212	Church location	1	40	IX - Benefits Ineligible	858489		Jypnvlj	1	Ada		Did not access OE Wizard	Market Control of Cont	
Master acc 0007212	Church location	1	040	I - Lay Employees	328614		Kogkgoe		TINA		Completed	5/1/2017 1:35:59 PM	5/1/2017 11:42:28 AM

## Who completed Open Enrollment and who did not

Last Name	First Name	Last Page Accessed	Enrollment Wizard Access Date
Akeckia	Mary Ellen	Did not access OE Wizard	
Bftntnj	DONALD	Did not access OE Wizard	4
Bitntrí	THEODORE	Did not access OE Wizard	1 K
Bprizzí	Lucia	Completed	5/3/2017 4:54:41 PM
Bqeyssi	DAVID	Completed	5/7/2017 8:32:30 PM
Brizipb	JAMES	Did not access OE Wizard	
Buicigo	EDWARD	Completed	4/30/2017 10:18:28 PM
Cftntrj	DAVID	Did not access OE Wizard	
Cznhrxd	ROBERT	Did not access OE Wizard	
Dpaxdxf	JAMES	Did not access OE Wizard	
Eccwcea	HENRY	Did not access OE Wizard	
Fdridnb	DOROTHEA	Did not access OE Wizard	
Fgigcii	Sr. Mary Fran	Did not access OE Wizard	
Fkeoccc	Marlene	Did not access OE Wizard	
Fuowaui	Nicholas	Completed	4/30/2017 10:49:09 PM
Fyrngmwc	JOHN	Did not access OE Wizard	
Girjihj	JAMES	Did not access OE Wizard	
Gsumgee	Michael	Completed	5/2/2017 2:51:05 PM
Hioymuc	Judy	Completed	5/4/2017 10:45:03 AM

